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Change Management Made Easy, A Practical Approach to Change Management for Digital Oil Field Programmes

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Abstract

Change management means different things to different people. Essentially change management should be an iterative process that utilises a set of organisation-specific tools and techniques to help an entity and its people transition from a current state to a sustainable desired state. When executed effectively, change management will minimise management risk and maximise return on investment (ROI).

Although every change initiative is unique, this paper aims to provide you with an insight into what activities and deliverables could be considered at each phase to maximise the benefits obtained from a clear and practical approach to change management and how the approach can be tailored and or scaled. Our proven approach is practical, heavily integrated with good programme/project management, and focused on the delivery of tangible business benefits. We will exam in greater detail the five “Es” that underpin our methodology: Explore, Expose, Engage, Educate and Embed.

Multiple common reasons for failure will be explored and practical steps to mitigate these will be explained. A demonstration of Science Applications International Corporation’s (SAIC’s) Practical Approach to Change Management is covered as a case study and noted throughout. This is based on a programme we recently worked on with a major North Sea operator. This was a digital oil field programme that has been recognised as the pacesetter within a global network of related initiatives.

The intended audience for this paper is people who are planning, designing and carrying out change and communication efforts in support of the digital oil field project, primarily the project team and commissioning manager. However, the principles of this practical approach to change management are applicable to any organisational change activity in any industry.

Many myths exist about change management, and we aim to address at least ten of these throughout this paper in an attempt to debunk them for you.

Introduction

“Change is as inevitable as death and taxes.”[1] This is an adaptation of a Benjamin Franklin quote that remains true in everyday life and becomes more relevant when considering the industry-wide impact of transformational programmes such as the digital oil field. With transformation comes change, and how change is managed is critical to the success of the transformation; a classic chicken and egg scenario.

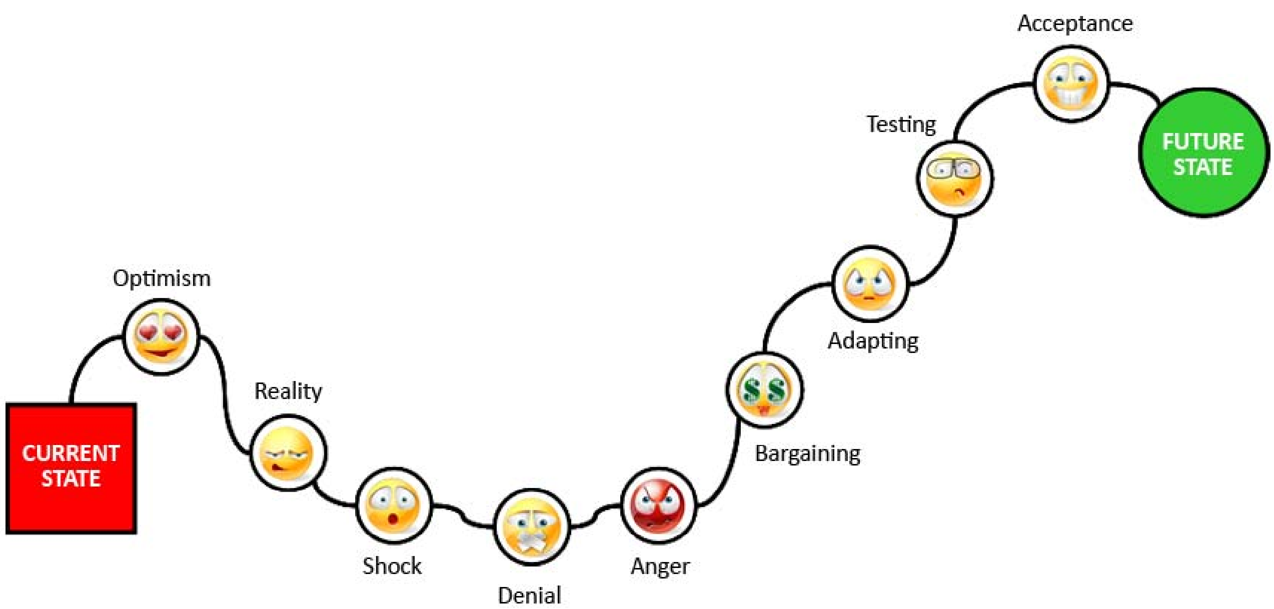

Figure 1 - The Change Curve: Individuals and groups will experience a variety of emotions known as the change curve. These can be experienced in a single day or across the life cycle of a transformation project.

However, the very mention of “change management” in a project context generates a variety of animated responses – few of which are positive. As change managers, we are more likely to experience a display of apathy, disinterest, cynicism and confusion from our project counterparts and stakeholders than we are enthusiasm, optimism or empathy. Is it any wonder then that research indicates that three out of four change programmes fail to deliver proposed benefits[2]. This is not because people don’t appreciate how beneficial good change management is; the problem lies in the fact that people don’t understand how good change management happens. What to do? When to do it? How to do it? To whom is it done?

This lack of appreciation is not necessarily the fault of the recipients or participants. Some change managers themselves are equally to blame for creating a service that is perceived to be some form of “black art” that has become surrounded by myth.

The surprising thing is that this “change apathy” is as true (if not more so) in the oil and gas industry as it is in any industry. In fact, the oil and gas industry is very good at change management and is willing to invest the time, money and resources to manage change when there is a compelling reason to do so. For example;

- Shift to directional drilling
- Behavouiral-based safety culture, holding handrails, lids on hot drinks
- Organisational change from functional-based structure to asset team (and back to functional structure in some cases)

Our industry’s problem lies in the fact that we struggle to demonstrate conclusive evidence on why these examples of change were successful and what drove that success.

Part of the problem is that change management is often delivered in a one dimensional, linear format that is frequently orientated around an individual’s primary skill set. One change manager will churn out newsletters and deliver training, another will place an emphasis on data governance and IT transition, whilst others will focus stakeholder management or process mapping. The truth is that good change management is all of these things and more. It’s how and when we place an emphasis of each these activities that will dictate the success of the change management approach.

Case Study

Over the past ten years, there has been growing movement in the oil industry around digital oil field initiatives, looking at how to utilise new technologies and work processes to address current business challenges. A major oil and gas company had a number of different initiatives targeting the development of new technologies, but grew concerned that the different initiatives were not effectively coordinated and that they were not paying sufficient attention to the work process and people changes that would be necessary to deliver transformational capabilities.

The programme, which initially pulled together these disparate initiatives, is now global in nature and responsible for identifying opportunities at business unit level. Project execution is then conducted at the business unit level by the business unit, with “central” support and guidance. A number of business unit project teams exist in various geographies, running projects at different stages of maturity. The case study we cover here, intelligent energy (IE), addresses one of the business unit-based programmes and is focused on the change management aspects. Essentially, the programme was focused on improved collaboration, production optimisation and reliability. However, due to the constraints of space, we do not give an exhaustive overview of the programme itself, but do reference some of the change management highlights. SAIC has an established track record in providing project management, change management, business analysis, organisational capability and technical architecture resources into many of these business units programmes.

Approach

Many change management methodologies, approaches and toolkits exist and are freely available. However, the key to successfully managing change is not necessarily dependent on purely utilising these resources in an administrative nature. A more important factor is how the change challenge is approached and the quality of people available to you to execute any change programme. People with relevant experience, natural characteristics and creativity will be able to refine and tailor your own preferred, commercially available or homegrown methodology into a tailored and specific approach.

Effective change management is particularly important to digital oil field programmes for three main reasons:

1. Digital oil field is about process change, not just technology change
2. Digital oil field aims to break down barriers between disciplines and geographies – this means getting people to work in different ways; changing the way we work is difficult to achieve as people are frequently initially resistant to change
3. Digital oil field projects are different from previous technology or process change projects, and there will be a higher risks associated with effective implementation

Successful change management methodologies follow similar principles and aim to deliver embedded capabilities or “new ways of working” and drive sustainable results by:

- **Visioning:** Positioning the project, regarding its vision, objectives and benefits, to the organisation and individuals impacted by the change
- **Definition:** Defining impacts of change and determining actions required to successfully manage the risks and issues resulting from change
- **Communication:** Communicating change and determining appropriate means to build stakeholders buy-in and develop ownership
- **Competency:** Developing skills and providing coaching to support users and managers to adapt to the new working environment and become change agents
- **Interventions:** Anticipating and determining resistances and concerns to intervene in a timely manner to minimise related risks and barriers
- **Alignment:** Providing support and assistance to ensure alignment of culture, organisational structure, people, policy, processes, and systems
- **Measurement:** Monitoring key metrics to implement actions for continual improvements

Whilst working with a number of upstream clients over the past few years, it has become apparent that most have an understanding of the need for change management. Some have invested and developed or adapted their own preferred approach, but most do not have strong capability in this area. Even those who have developed an approach tend to focus heavily on one-way communication and stakeholder management. These two activities are important, but change management is much more than this.

Change Management Myth 1:

Change management teams should work independently of other teams (project managers, systems programmers, process designers, etc.).

Change management is a key element of a project's success and should never be treated as an afterthought or "add on." The change manager forms the "glue" that keeps end users involved and engaged.

So who does change management? To design and deliver a truly integrated change management service, it should not be considered the role of one or two individuals operating in a silo. The entire project delivery team must both be aware of and competent in change management tools and techniques. If change management is delivered in isolation, you will fail. Everyone in your project delivery structure should contribute to and be responsible for aspects of the change management approach and plan for success to be achievable. As a result, the role of the change manager is as much about influencing and managing the delivery team as it is about the customer or end user.

Change Management Myth 2:

Change management is that touchy-feely survey and psychological assessment work.

Some approaches to managing change do include surveys and assessments, but a successful approach must also be pragmatic, implementable, and results-oriented.

So when do we do change management? One luxury that we have in the oil and gas industry is that there is a well-established project development and execution process in place for capital projects, and these exist in almost every organisation. Although there will be understandable variations on the theme, essentially, capital project management is consistent across the industry. This is a change management gift that cannot be ignored. Using this industry-specific project management roadmap -- that is typically a four- or five-phase gated approach -- SAIC has developed a complimentary change management approach that will work in complete alignment with project delivery, creating a practical approach to change management that makes it clear to both the client and the delivery team exactly what will be done, when and why. This practical approach to change management is based around five phases that are themed: Explore, Expose, Engage, Educate and Embed.

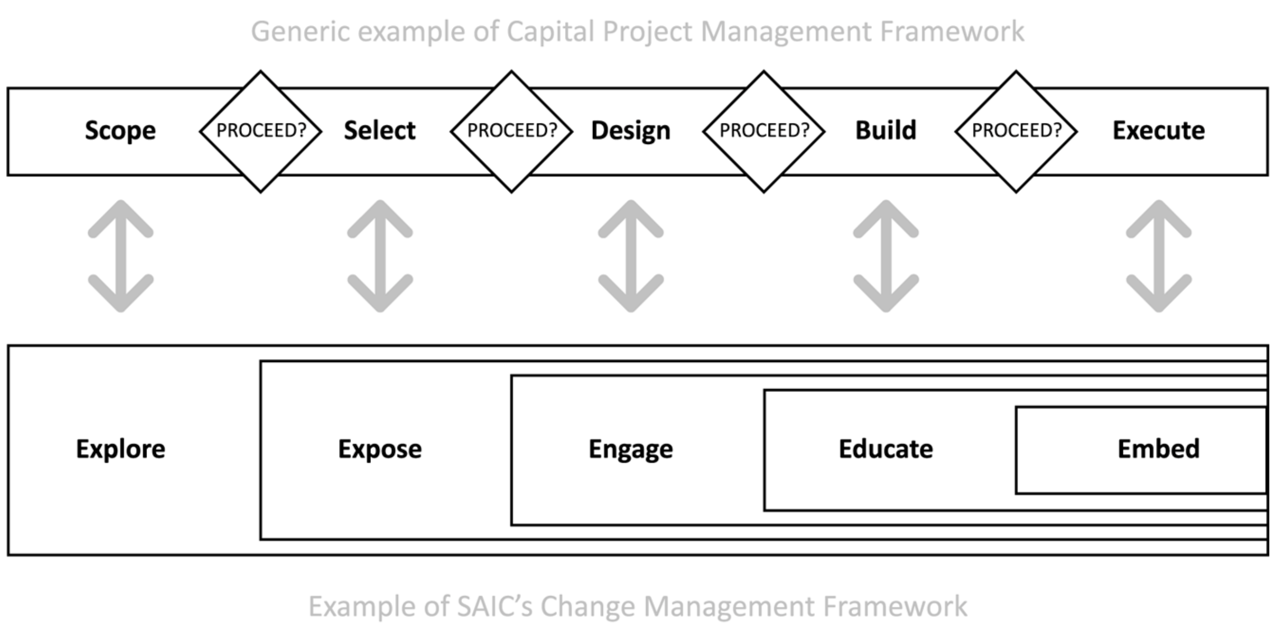

Figure 2 - A Practical Approach: Change management should not be conducted within a silo. Effective change management must work in complete alignment with overall project design and delivery.

It is important to understand that the activities undertaken in each of the five themes or phases are not sequential but concurrent. As your programme matures, you do not stop doing any of the previous activities. By phases four to five, you should be doing all of these activities; only the emphasis changes. As a result, the change effort ramps up significantly from phase three, and your project and resource planning should anticipate this.

Change Management Myth 3:

The change management team should roll on at the end of an implementation to handle training.

Change management requires early and ongoing involvement; involvement only at the end may be simply "change triage."

The Five Es

Explore – *Expose – Engage – Educate - Embed*

One common myth is that change management is something that is done at the end – post implementation. The truth is the sooner you can begin managing change, the more likely you are to achieve success. By having successfully acquired an experienced change manager, your initiative will benefit from a wealth of experience and access to a toolkit of tried and tested techniques. However, although it is important to have acquired these skills early, the temptation to start exposing your day-to-day achievements and ideas to your audience prematurely should be avoided.

Change Management Myth 4:

The communications planning step takes place once: at the beginning of a programme/project.

A communications approach can be set at the beginning, but communications planning should be an iterative, ongoing process aimed at "steering" and adjusted, based on feedback gathered.

Before you do anything, the entire team needs to understand the environment in which they are working. What are the environmental considerations of the assignment? Are the assets onshore or offshore? If they are offshore – as ours were on IE – does your project team have the necessary certification, training and credibility to adequately engage with these communities?

We need to be able to fully understand the characteristics of the organisation we are planning to change and "get to know" the change community and how it will be affected. Most people will react negatively to being told they are to be "managed through a change," and how the change managers and the project team interact with the community affected sets the tone for the entire project. In fact, the very idea that you would introduce yourself to a potential end user as a "change manager" could be somewhat counterproductive. If a discreet approach to change management is the order of the day – as ours was on IE – it would be wise to adopt a more user friendly "working title" for the duration of the project.

The use of some form of systematic information gathering and analysis is key to bringing rigor when implementing sustainable capability or changes in an organisation. Change management tools are a means to an end and not an end in themselves. The information gathered, and the resultant actions and interventions, must be handled sensitively. To support this, our practical approach relies on us observing behaviour over time and capturing our findings in an indirect way. By this, we mean that we do not go out with clipboard and questionnaire in hand, firing questions at our change community. On the contrary, we work alongside other members of the project teams in a consultative and collaborative way, engaging the change community as part of the project, from as soon as is possible in the project life cycle.

Ultimately, the initial objective must be to have a clear approach and plan that is endorsed and validated by both the customer and the project delivery organisation -- to successfully develop a comprehensive change management plan that will provide a solid foundation for the life cycle of the initiative. Some of the key activities that should be considered for the initial Explore phase;

- **Change legacy:** What historical change initiatives have succeeded or failed and why? What lessons can be learned?
- **Change landscape:** We are constantly being told there is initiative overload. What other initiatives are on your community's radar? What does the current and future change initiative landscape look like? Are your audiences overloaded with or fatigued with change? What initiatives can you align with or even absorb? What change initiatives are on your community's radar but, in terms of timing, aren't actually an immediate priority?

- **Culture:** What is the organisational culture and how will this influence your approach to change and communications? What are the protocols and required etiquette regarding communications and meeting management? What are the cultural considerations for this assignment? How do people like to be engaged? How do they like to receive and absorb information?
- **Constraints:** Initiatives like digital oil field exist because our resources are "too busy." So, why would these already busy people feel compelled to wade through our newsletters and project jargon in an attempt to figure out what we are doing -- let alone attend and participate in project meetings and workshops? Personnel on board (POB) optimisation? One of the IE project drivers was POB optimisation. So we asked ourselves: Why would the offshore installation managers (OIMs) have us taking up a bed – as opposed to an engineer or a driller? How can we ensure any offshore engagement is seen to be valuable by both parties?
- **Organisation:** Is the organisation hierarchical? What does the "formal" organisation look like? And what are your informal stakeholder and user community networks?
- **Environment:** What is the physical environment in which you have to operate? What challenges and opportunities does the physical environment bring (e.g. onshore, offshore)? What is the physical environment like? In our experience, the oil and gas sector is "poster heavy." How do you plan to identify the "white space" where your messages can be absorbed sufficiently?
- **Expectations:** What are the expectations around the frequency and sophistication of your change efforts? Are you adequately resourced to meet these expectations in relation to the scale of the initiative?
- **Delivery team requirements:** What does your programme delivery team look like? How does that match a number of the areas analysed above? On IE, we were fortunate that 75 percent of our project team had the required offshore (bosiet) certification to enable them to travel offshore for closer collaboration. The programme manager and two projects leads had significant change management experience.

By taking the time to adequately assess the nature of the assignment and by using this acquired knowledge in conjunction with inherent experience, you should be able to develop a robust change management and communication plan that will outline a series of milestones and principles that will guide and shape the team's ongoing change efforts.

Explore ***– Expose –*** *Engage – Educate - Embed*

With a suitably documented and discussed change management plan and approach in place, as a stakeholder or contributor to the actual delivery of the change, Exposure should be your next main priority. Do not make the common mistake of assuming everyone else cares. Just because you may have taken the time and effort to produce and publish a newsletter does not necessarily mean that your audiences are getting the message.

Significant change initiatives often exist because there is a real business requirement to ease the workloads of individuals and groups and make them more efficient. It is therefore imperative that your initiative does not add to this burden and you create an environment where exposure of your vision can be realised by your communities with minimal effort and maximum impact.

> Change Management Myth 5:
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> Communications = e-mails.
>
> The vehicle should be appropriate for the content and audience; all possible routes should be explored and exploited. Two-way communications should never be overlooked.

Ideally, you want to create an identifiable and accessible programme structure that eases and stimulates the communication flow between the programme and your change communities. Some activities that would help you achieve this in the Expose phase are as follows:

- **Programme definition:** Does your programme design have communications in mind? The IE case chose to have focused sub-projects within a single programme, rather than one programme with an ever-evolving list of deliverables. Creating a related suite of projects with clearly defined change communities made targeted, informative communications achievable.
- **Branding:** Branding is somewhat of an overused term in the project world. Simply badging your documentation with a logo and over-engineered acronym does not constitute a brand. Aspiring to brand your project(s) is admirable, but you must be aware of the effort involved to effectively manage this over the life cycle of your project. For our IE initiative, we utilised the corporate-wide logo at programme level and created three complimentary sub-brands for each of the projects that had their own unique scope and communities.

- **Foundation elements:** On IE, once we had our structure and knew what it looked like, we got our foundation communication elements in place. These included: intranet, Microsoft's PowerPoint®, elevator speech…etc.
- **Visioning:** What is the ultimate goal of the initiative? What will the end result look like? What does it mean to me?
- **Targeted factual messaging:** Tell people what they need to know, when they need to know. Communicating facts – that do not change – helps to instill trust.
- **Awareness campaigns:** Who needs to know? How do you best get the message through? How do you know if you've been successful? The thing with awareness is you don't have to tell everyone everything week-by-week, or minute-by-minute. The IE team developed and designed four quarterly, high-impact awareness campaigns to help everyone understand the basic facts. The foundation elements were there should anyone want more detail. For example, last year we designed and delivered an offshore awareness campaign in parallel with the 2006 football World Cup, which enabled us to maintain visibility and interest across all installations and all shift patterns.

By conducting the above activities successfully, you should have a clearly defined, recognisable programme with a set of change visualisation products that will allow you to expose your objectives to the various stakeholder groups:

- What you are planning to do
- Why you are doing it
- How it's going to be done
- When

Once our IE programme was well-defined, we baselined the change plan and agreed to it across all project teams and key sponsors. However, we always understood it was okay to change –the change-plan as the programme and environment evolves. We are change managers, after all.

Change Management Myth 6:

The role of sponsors is to mobilise funding and resources, and sit back and wait for results.

Sponsors must routinely demonstrate visible support for the new change and find ways to encourage sponsorship and accountability in their direct reports.

By successfully exposing your sponsors to your vision and intentions early enough, together you should be able to assemble a network of influential and credible individuals that are representative of your user communities and that can support the selection and design process moving forward. The quality and diversity of your extended virtual project team (work team) will be an indication of how successful you have been in the Explore and Expose phases.

Change Management Myth 7:

End users should be involved primarily in a review and sign-off capacity.

Commitment stems from involvement by the target audience (on design of processes, systems, training and communications).

Explore – Expose – ***Engage*** *– Educate - Embed*

Another common myth is that simply communicating the objective and progress as we had done in the Expose phase is sufficient change activity prior to deployment and training. However, communication activity should only be regarded as a mechanism to achieve adequate engagement.

In terms of our IE programme, one of our main findings during Explore was the lack of available resources to execute our projects. Subsequently, we designed and assembled work teams of domain experts to provide ample business unit coverage. These people carried on with the "day job" and acted as an extended project team, coming together at regular intervals for focused validation and review sessions. The dedicated project resources were then able to progress project activity with minimal disruption to peoples' core responsibilities, whilst still keeping them actively engaged.

Change Management Myth 8:

Only the most positive “bought-in” employees should be asked to participate in implementations.

The greatest champions of a new change can be the people that started as the most vocal dissenters.

From a change management perspective, the overall objective of this phase is to expose people to, and engage people in, the selection and design process as early and frequently as possible. Engagement should not be orientated around demonstrations but should have an emphasis on interaction and participation. Quality and timely engagement is essential to the success of any change initiative. Engagement activities would include activities such as:

- **Product selection:** Does your initiative involve commercial proprietary products? Have stakeholders and users been involved in the selection process? Have the results been qualified and published?
- **Design Sessions:** Are you building tools from scratch or re-engineering existing processes? Have stakeholders and users been involved in the design sessions? On IE, we promoted interactive design and solution selection with our work teams wherever possible. If people can’t use something, they won’t! And subsequently, the programme will fail. We empowered our work teams during our interactive design approach and got them to hold sessions with colleagues and take the lead. This paid huge dividends with the business unit members feeling they were creating their own future -- it was not being done to them. It also led to some competency prior to training and buy-in. As a result, our work teams became empowered through this direct involvement, and they cascaded the value and benefits of the programme and new capabilities to their peers.
- **Prototyping and Piloting:** Do you have any products that users can interact with? Do you have adequate support and scenarios to control and measure the user interaction so users do not just play with a product? As an example on IE, one of our projects built an active prototype to enable the engineers to see what we were talking about and input and modify as desired. Another ran a pilot utilising new technology on a discrete area of the offshore operation to ensure the technology was usable and acceptable to the end users. Both proved very useful and key to acceptance at later project phases.
- **Stakeholder engagement continues:** On IE at this stage, we ensured that we also involved key business functions, such as IT, HR, leadership, group and Public Affairs and third party contractors, to address early buy in, support, competency and ownership expectations and requirements.
- **Stakeholder and user profiling:** Do you adequately know who your communities are? Do you understand their requirements and expectations? Are you aware who is supportive and who is resistant and why? Are any suitable candidates emerging that can help to embed the change when the initiative is delivered? On IE, we required good change agents across multiple domains. We conducted discreet change agent assessments to establish candidates that could assist us in embedding the change within the business unit. We also mapped formal and informal networks to enable us to manage the change within communities more effectively.
- **Change agents and champions (super users) are not the same thing:** Change agents have the organisational credibility to influence and encourage the change. Champions have the technical competency to support the transition.
- **Incentives and reward active participation:** You are no doubt working with relatively large budgets. On IE, we were permitted to allocate a tiny proportion of our budget to high-quality giveaways and incentives to active participants. You’d be surprised how many doors Apple Inc.’s iPod® can open.
- **Training plan (draft):** All of these activities enabled us to begin drafting the training plan for phase four: Educate.

From well-coordinated user engagements, not only will the project itself benefit in terms of quality requirements capture and design enhancements, but from a change management point of view, engaging stakeholders in an interactive design format, where feedback is actively demonstrated to be acted upon. Such engagements not only significantly increase buy-in, but also improve competency levels long before final implementation, easing the reliance on training.

Explore – Expose – Engage ***– Educate -*** *Embed*

Change management doesn't stop when the solution is delivered – it starts! However, training is not an excuse for poor design or implementation. Interactive design in the early stages improves usability and develops competency well in advance of the formal training efforts. None of us have been trained to use the Internet or mobile phones, but we use them almost every day. Being too reliant on purely training is risky.

Change Management Myth 9:

The "training" task = training delivery

Training needs should be assessed, training planned, developed, delivered, effectiveness measured and improved as required. Design should consider the audience(s), new processes, procedures, metrics, systems, etc. Training should not be considered as one off, and future training needs should be addressed and transitioned into the host business.

Although the participative nature of our approach does improve usability of deliverables and competency of the end users, adequate training and support is still an essential component of delivering sustainable change.

Training should not just be regarded as a 'tick-the-box' exercise. Any user engagement should be regarded as a change management activity. Training should be designed for the audience and be both enjoyable and informative, as well as an opportunity to improve usage and take up.

It is also important to consider the wider educational requirements and expectations of your communities. A common mistake is simply to schedule traditional classroom style training, execute the training, complete the post-training questionnaire and publish the results.

Particularly in the oil and gas sector where shift work is so prevalent, training must be considered in conjunction with support – which is often overlooked. Therefore, it is imperative that beyond formal classroom style training, additional support mechanisms are both provided and communicated.

To design and deliver a comprehensive training and support function as part of the change efforts during the Educate phase, the following activities should be considered:

- **Training design --** Training plan (baseline) and resourcing: We worked with HR, vendors and specialist training providers to finalise and baseline the training plan, and secure the necessary resources. Training design: with such new ways of working, classroom-style training isn't always appropriate. On IE, we worked closely with our trainers and work teams to ensure that training was as engaging and realistic as possible. By this phase, our IE programme had gained the reputation of being "something a bit different," and we carried this through in our approach to training.
- **Training delivery --** Train the trainer: On IE, we used the train-the-trainer approach both to help ensure competency and provide a degree of programme context. This equipped business unit-based staff to become trainers, giving them deep awareness and commencing our transition from a set of projects to an embedded capability.
- **Training execution --** Always tailor execution to suit different subjects and audience groups. Be careful not to expose individuals in front of others, and be aware of formal and informal influencing routes. On IE, we ensured specific and tailored training was available and used multiple techniques -- blanket awareness, one to one, specific expert engineering consultancy sessions provided by third parties, offshore, onshore, utilised collaborative technology to simultaneously train on and offshore, computer-based training models, training for support teams separately to training for end users, etc…
- **Post-training support --** It is essential to ensure your capability is embedded and a plan for training of new starts and refresher training is accessible long after the project team has departed. On IE, we included our computer-based training models in the already well-recognised online corporate "university" and handed our now well-established relationship with a third party training organisation over to the business unit training manager to help ensure continuity and consistency. Each project also funded a business unit-based coach on specific capability areas to be active in the business unit for one year post-project to allow the leadership team time to consider if head count should be increased in this area in a de-risked way.
- **Super user identification:** Interactive design and training provided the opportunity for the project team to identify super users that could support colleagues during the transition from current state to future state. However, super users should not be confused with change agents, as these are two are completely different but complimentary skill sets.

By providing adequate training and support, the transition to the new ways of working will be eased with increased awareness, competency and enthusiasm amongst the change communities. By this stage of the change management efforts, the project should be in a position to disembark and initiate the handover.

Explore – Expose – Engage – Educate - ***Embed***

All change management efforts should be designed with the ultimate objective of successfully embedding the new capability or facilities within the organisation – not simply to demonstrate how well-groomed and articulate the project team are or how many animations they have on their PowerPoint. Having successfully completed the previous four phases – Explore, Expose, Engage and Educate – you should be in the position where the programme or initiative no longer exists, and these new ways of working are simply the norm and the preferred (or only) option.

Change Management Myth 10:

The more performance metrics the better

Too many metrics dilute focus; performance metrics should align with strategic high-level objectives and, where possible, utilise measurements that are already gathered.

Indicators that you have been successful in managing the change through these five phases would be:

- **Transition period:** Appropriate metrics capture and reporting will be invaluable in determining the success of the transition and ongoing evolution. However, many change efforts will not necessarily demonstrate tangible business benefits overnight. Stakeholders should be suitably aware and supportive that there will be a transition period until these hard metrics are fully realised. Many digital oil field deliverables can deliver softer benefits almost immediately, however.
- **Advocates:** Once fully executed, the facilities and techniques delivered by digital oil field programmes should be visibly endorsed wherever possible at all levels of the organization. Can the CEO now revert from PowerPoint to live data for "town hall" meetings and briefings? Can team leaders exhibit and encourage better collaborative behaviours? Show, don't tell people about the benefits of change.
- **Support structure:** Although individuals and teams will have been suitably trained by this stage, not planning for and delivering a suitable support structure will put the long-term usage and optimisation of the digital oil field deliverables at unnecessary risk. Particularly in a working environment where shift patterns are prevalent: Are there suitable reference resources for individuals to refamiliarise themselves? Are coaches, mentors and super users identifiable and accessible? It is also important not to ignore the more fundamental support aspects, such as technical, HR and third party management.
- **Incentivisation:** "What's in it for me?" will probably be a recurring theme throughout the design and delivery process. Some degree of incentivisation and objective-setting should be formalized in conjunction with leadership and HR. Are individuals and teams objectives being formally updated to reflect these new expectations? Are individuals and groups being incentivised appropriately – not only to use, but to optimize what has been delivered?
- **Continuous improvement:** Without the appropriate leadership and support mechanisms in place, there will be a risk that what has been delivered will not only stagnate but possibly even diminish or erode. As part of the handover, there should be a framework by which the scope of what has been delivered can be effectively developed and optimised in a controlled manner.
- **Knowledge sharing:** It is important to have a forum by which successes can be shared and lessons learned to have a truly inclusive understanding of how to achieve the most out of what has been delivered. It is also important to be equipped for the traffic that your successful deployment(s) will generate. Don't be surprised when colleagues and partners turn up from far and wide, wanting to replicate and fast track what you have delivered.

Instinctively, you know whether you have succeeded or failed; however, demonstrations of the above provide a decent indicator as to where your strengths and weaknesses lie. A common myth is that initiatives succeed from good solution design and project management and fail as a result of poor change management. Good change management cannot save a bad solution. To truly embed new ways of working, it is imperative that project and change management are truly integrated from concept to delivery in complete collaboration with leadership and end users.

Conclusion

Thankfully, the oil and gas industry is fast becoming more vigorous in its assertion that competent technical solutions alone will not deliver the desired sustainable change that the digital oil field demands.

More and more, we hear that the people, process and technology aspects of the digital oil field have to be managed in equal measure. As an industry, we have to raise the bar in terms of our expectations and approach to how change management is delivered effectively. In doing so, not only will individual operations benefit, but the industry will benefit as a whole.

In many instances, change management may still remain somewhat of an enigma. The value that good change management delivers is not disputed. To address this, simply ignoring or isolating change management in the context of project management and delivery is not an option. This will only increase cost and risk to the success and sustainability of your change initiative.

If people, process and technology are truly the linchpin of the digital oil field, then at least these three change management guidelines should help us all re-invent how we perceive the management of change in the digital oil field mix:

- **People:** The acquisition of proven change management expertise to your programme is essential. However, the awareness of, and the contribution to, the change effort from the entire delivery organisation should not be overlooked. The recruitment of an appropriate programme manager is essential to this being achievable.
- **Process:** Change management is a marathon not a sprint. You should have a change management approach that enables you to compartmentalise change activities in complete alignment with project delivery, enabling you to focus and measure your change efforts appropriately.
- **Technology:** Don’t fall into the comfort zone of e-mail- and PowerPoint-driven change. Make better use of the abundance of tools and techniques that are available to us in the digital age.

By adopting a more practical approach to change management that is truly integrated with the overall project management approach, everyone involved will be able to contribute to, and benefit from, the change management efforts. Our tried and tested five Es approach – Explore, Expose, Engage, Educate and Embed – has proven successful in various oil and gas organisations and geographies.

References:

1. This is an adaptation of an extract from a letter to Jean Baptiste Le Roy from Benjamin Franklin in 1789
2. PwC MORI survey of 500 organisations in 1999